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ABSTRACT

This booklet is part of a self-instructional program designed to train public school personnel in how to manage educational projects. It is a condensed version of the lessons on the preparation phase of project management presented in full in module 2 of the program. This booklet focuses on the implementation and start-up activities that must occur immediately after a project has been approved. The lesson identifies and gives examples of major activities involved in preparing to put a project into operation. It also focuses on the implementation of the major components of a project information system, including dissemination and the formulation of a management responsibility chart and an organizational chart for personnel. A short posttest concludes the lesson. (Author/JM)

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PROJECT
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U.S. DEPARTMENT OF HEALTH, EDUCATION & WELFARE
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MINI WORKSHOP PACKET FOR PREPARATION PHASE OF PROJECT MANAGEMENT

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OVERVIEW

The Project Management Cycle is broken out into four phases:

- Planning
- Preparation
- Control
- Termination

The planning phase includes such activities as defining the project by devising a work break-down structure and work flow, securing time estimates, establishing a list of resource needs and deriving a budget. The output of the planning phase is a project plan or proposal. Often, in education, this project plan or proposal is submitted to a state or federal agency for approval and funding. Sometimes, the plan is submitted to a superior within the local school district or educational agency for approval or "a go-ahead."

Once the project plan has been approved, it is now necessary to conduct implementation and gear-up activities. Such activities include project or contract review, hiring personnel, delineating organizational structure and responsibilities, designing a reporting system, obtaining needed equipment and materials, securing space and establishing the project information system.

The Preparation Phase of Project Management is involved with the coordination and pulling together the many diverse but necessary activities which follow as a result of a project plan or proposal being funded and/or approved.

OBJECTIVES

Upon completion of this lesson on Project Preparation, the user should be able to:

1. Identify the major activities involved in preparing to put a project into operation.

2. Identify the essential components of a project handbook.

3. Develop an organizational chart for project personnel.

4. Develop a management responsibility chart for a project.

5. Identify the major components of a project information system.

6. Identify the basic elements of a project data base.

LESSON ABSTRACT

There are two basic tasks involved in project preparation: preparing to put the project into operation--start-up activities - and developing the project information system.

A project start-up plan should be developed as well as, the project information system, prior to the initiation of project activities. Careful planning and preparation at this stage can prevent many problems and delays in project operations.

CONTENT OUTLINE

A. A plan for project start-up should be developed.

   1. The plan should cover proposal and contract review, project manager appointment, personnel recruitment, equipment and materials acquisition, space and facilities acquisition, and project handbook development.

   2. The ability to implement the plan is affected by the lead time available between the approval date and project start date.

B. Proposal and contract review often results in changes in areas of performance, objectives, schedule, budget manpower requirements, and performance specifications.

C. A project director should be identified and appointed early. He must be given the authority and responsibility to get the project underway.

D. Personnel recruitment should be planned.

   1. Personnel requirement should be listed.

   2. The project staff and district should be oriented to the project.

   3. It may be necessary to conduct needed staff training.

E. Equipment and materials acquisition should be planned.

1. Equipment includes direct cost items necessary to project operations but not normally consummable.

2. Materials are direct cost items but usually viewed as consummable.

F. Space and facilities acquisition should be planned.

1. It is important to have an adequate and pleasant work space.

2. Desks, typewriters, storage cabinets, and related items to be secured should be identified.

G. The project information system serves to:

1. Reflect actual progress against planned project status at any given time.

2. Provide a means for general communication as well as specific techniques of reporting.

H. The components of a project information system are:

1. Data base

2. Organizational chart and related documents

3. Project handbook or manual

I. The data base is developed using a number of principles

1. The data to be included come from planning decisions, concerning the time, cost, and performance for the various tasks.

2. The proposal document and negotiated contract are used as a data source.

3. The data base will be dynamic, not static, to reflect changes in project operations.

4. Written records are developed for each task showing time, cost, and performance data.

5. Processing of data can be done manually or by computer depending on the degree of complexity.

6. Reports are the principal vehicle for presenting data and information to the project director and staff.

J. Organizational charts and related documents are developed using a number of principles.

1. The Project Organizational chart is created to show authority and responsibility patterns and to identify decision centers.

2. The Written Job Descriptions are derived from the organizational chart and typically show:

a. Position title

b. Duties

c. Resonsibility and authority

3. Management Responsibility Guides are constructed in matrix form to show responsibility for project tasks.

a. The columns usually represent positions.

b. The rows usually show tasks.

c. The matrix cells indicate types of responsibilities for project tasks.

4. Flow and Process Charts are developed to reflect movement of data and reports in and out of project decision centers.

K. The project handbook or manual is a basic element of the information system.

1. The handbook contains the organizational chart, flow charts, responsibility guides, and policy and procedures statements.

2. The handbook is revised as components of project information system are modified.

3. It should be distributed to each staff member.

L. A project information system is essential to operational control of a project.

PROJECT START-UP

EXAMPLES

Example A

Project X in Jonesville Local School was about to begin a project designed to change the attitude of students and staff in three buildings. The project proposal stated that "space sufficient to house the project staff and required facilities and equipment will be rented in a local business office building," since space was not available in the schools to house the project staff and required facilities and equipment. No more consideration was given to this item until word was received that the project was funded and could start in six weeks. At that time, the superintendent did not begin to look for project office space, but waited until two weeks for the scheduled start of the project. When he did begin to look for office space, he found that none was available until the end of the next month. Consequently, the project begun one month late due to the failure to initiate project start-up activities early.

Example B

Project Y in Smithville City Schools began as scheduled. One of the early project work units required the assistance of a consultant from the nearby university. No attempt, however, was made to ascertain his availability until one week before his help was needed. Unfortunately, the professor was scheduled to be out-of-town the week he was needed and heaviiy booked the following week. Consequently, project operations were held up for two weeks while waiting for his services.

Example C

Project Z in Orangeville City Schools was nearing completion of its first year of operation. In order to receive continuation funds for the second year, the funding agency was requiring evaluative data regarding pupil achievement according to the project objectives. Eight months after the start of the project, the project director hired an evaluation specialist to design the necessary evaluation instruments. It was discovered, however, that it was impossible for the evaluation

specialist to design instruments to measure pupil attainment of the project objectives since the project objectives were written without reference to any performance criteria or specifications. For example, one objective stated that the project would "produce students who are highly stimulated to go ahead on their own whenever possible." Consequently, the project staff had to take time out to create new project objectives that included performance specifications and were congruent with the activities conducted during the first year of the project. Then they had to hope the funding agency would accept their "after the fact" changes.

PROJECT INFORMATION SYSTEM

DEVELOPING AN ORGANIZATIONAL CHART

DIRECTIONS: Read the description shown below from part of a proposal or project plan. This is not a complete proposal; it is intended to give a brief overview. After reading the partial plan, proceed to the next page.

INDIVIDUALIZED READING PROPOSAL

SUBSECTION II--PROGRAM ACTIVITIES

This ESEA proposal is concerned with the establishment of an Individualized Reading Laboratory to meet the special education needs of educationally deprived children from grade three through six in the following elementary schools.

Melrose Hudson Linden Armstrong Washington

The primary concern of this proposal is with children who suffer from a dual disadvantage: Academic and Fiscal.

It is this proposal's intent to improve the learning climate for these children in a rapid effective manner. A secondary purpose of this proposal is to train teachers and aides who have little or no experience in Individualized Reading.

Brief Description:

Reading classes will serve children in grades three, four, five, and six. Children in small groups (10-14) will receive individual instruction in a laboratory type setting. After identification of the child's weakness through the utilization of diagnostic instruments, the teachers will develop an individualized prescription from a wide variety of learning materials to overcome his educational weakness in the area of reading.

Those children evidencing the most severe deficiences in reading will be transported to the "Barrier Analysis Centers," for intensive diagnosis. Upon completion of the diagnostic process, individual remedial prescription will accompany each child as they return to the home school Reading Laboratory.

1.1 SUBJECT TO BE TAUGHT: Individualized Reading

1.2 GRADE LEVELS

3rd--125 pupils	5th--50 pupils	Total--350 pupils
4th--125 pupils	6th--50 pupils	

SUBSECTION III--DISSEMINATION

The Jonesville School District views dissemination as a twofold affair. First, there must be local efforts in order to build local support for innovative programs. Secondly, there must be effort beyond the local in order to spread information of successful programs.

Local Dissemination:

Periodic news stories will be released to local press and radio. An attempt will be made to place several feature stories about the program in the local press and on local radio.

Program spokesmen will be made available to PTA and other groups. We will actively encourage building principals to make use of these spokesmen.

Program personnel will carry out some dissemination activities with school personnel and community people as part of their everyday activities and other work done by these personnel and community people as a part of their everyday activities. All work done by these personnel will be identified as federally funded under ESEA Title I.

The School District will prepare and distribute a brochure on the program.

State and National Dissemination:

The brochure mentioned under local dissemination will be available for wider distribution.

Program and other personnel will be available for work at state and national conferences. They will, in fact, seek out the opportunity to appear on panels at such conferences.

DIRECTIONS: Study the project budget shown below for the proposal from the previous page. An abbreviation for personnel roles in the project are shown immediately following the position title. After studying the budget, proceed to the next page.

INSTRUCTIONAL (200)

	Salaries	Others	Totals
210 Project Manager (PM)	$ 12,000		
211 Communication Specialist (CS)	10,800		
212 Reading Supervisor (RS)	10,800		
213 5 Reading Teachers (RT)	46,000		
218 5 Teacher Aides (TA)	15,000		
222 Materials and Supplies		$ 13,369	
224 Audio-Visual Materials		2,000	
TOTAL INSTRUCTIONAL			$ 109,969

FIXED CHARGES (800)

831 Retirement		9,460	
832 FICA		4,730	
834 Insurance		1,600	
TOTAL FIXED CHARGES			15,790
TOTALS	$ 94,600	$ 31,159	$ 125,759

PROJECT INFORMATION SYSTEM
Management Responsibility Guide

DIRECTIONS: Using the partial proposal plan and the personnel shown on the budget, assign staff a primary responsibility to the functions (tasks) listed below by putting a "1" in the appropriate matrix cell.

NO.	ACTIVITIES/FUNCTIONS/TASKS	PM	CS	RS	RT	TA
1.	managing the project					
2.	developing of program brochure					
3.	speaking to school and community groups					
4.	working in regional, state, and national conferences					
5.	releasing news articles to news media					
6.	planning reading activities					
7.	teaching reading					
8.	organizing the reading materials center					
9.	operating the resource center (day-to-day)					
10.	maintaining individual students skill mastery and behavioral records					
11.	developing student before and after attitude tests					
12.	administering placement, achievement, and attitude tests					
13.	developing teacher and aide response journals					
14.	maintaining teacher and aide response journals					
15.	coordinating with supportive services					
16.	developing and operating the inservice training program					
17.	involving parents in the reading program					
18.	ordering supplies and equipment					

CODE

1 - Primary Responsibility - Individual is directly responsible, at the operating level for execution of function

2 - Must Approve - Individual must grant approval

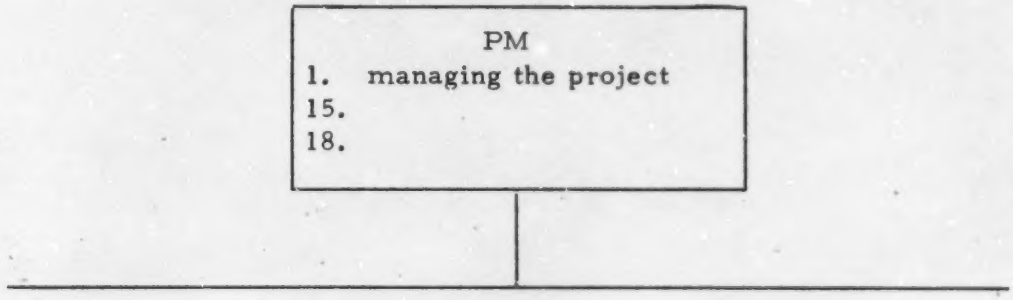
3 - Must Be Notified - Individual must be notified of action taken.

4 - Must Be Consulted - Must be consulted before actions are taken.

PROJECT INFORMATION SYSTEM

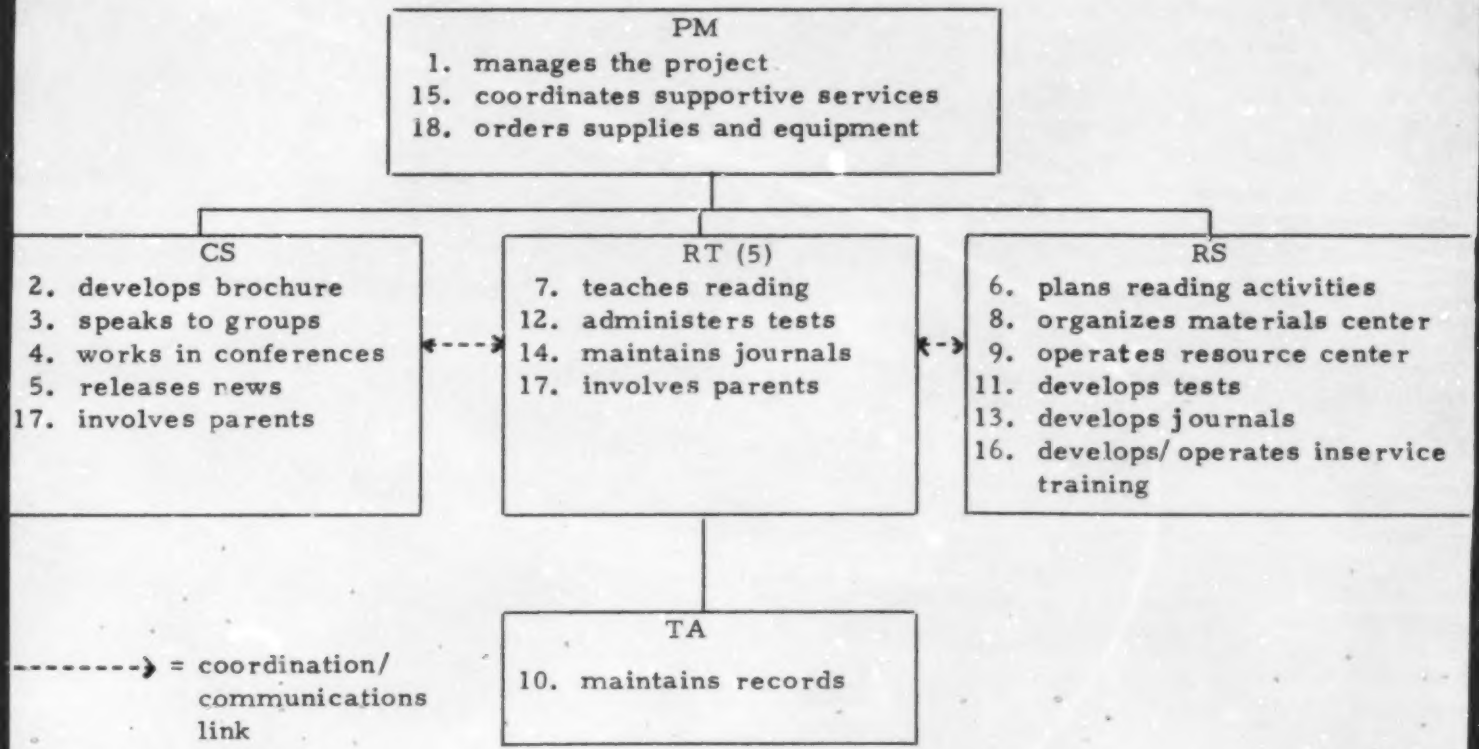
Organizational Chart

DIRECTIONS: Complete the organizational chart below such that the 5 positions (roles) and 18 functions are accounted for from the Management Responsibility Guide from the previous page. Use the underlined words and abbreviated titles of personnel as shown on the previous page.



PROJECT INFORMATION SYSTEM

Suggested Organization Chart



POST TEST

1. What is the major task of the project manager in project start-up?

   A. Recruitment and employment of project personnel
   B. Preparing the project budget
   C. Improving project operations by establishing an information system
   D. Orientation of project staff

2. What factor usually has a strong impact upon the successful initiation of the project?

   A. Lack of necessary computer facilities
   B. Time interval between the approval and the actual start-up date of the project
   C. Inadequate time to review the project proposal
   D. Lack of competent research staff

3. What is the commonly identified procedure or operation used in knowing what is happening in the operation of a project?

   A. Project proposal
   B. Project budget
   C. Project information system
   D. Project final report

4. What method is most often used to communicate information to personnel about project status?

   A. Workshops
   B. Orientation programs
   C. Newsletter and briefings
   D. Report forms and charts

5. Why does the project data base have to be continuously updated?

   A. To keep up with changes often made in schedules, costs, and performance.

B. To make a bettter project final report
C. To keep the funding agency up-to-date
D. To save project records

6. Why are management responsibility guides often developed?

A. To facilitate scheduling
B. To show budget reporting procedures
C. To establish the authority and responsibility for project activities
D. To assist in personnel recruitment

7. What is the basic or principal function of the project data base?

A. To collect information for writing the project final report
B. To accumulate information regarding the budget
C. To accumulate background information about funding source operations
D. To accumulate, in one place, all of the schedule, budget and performance decisions made during the planning phase

8. What is the main purpose of a policy and procedures handbook?

A. To facilitate the project manager's decision-making during project operations
B. To inform project staff about budgetary procedures
C. To improve project operations and staff morale
D. To provide more information about future activities of the project

9. At what time in the project life cycle should the project policy and procedures handbook be developed?

A. When the decision to write the project proposal is made
B. Upon completion of project definition
C. During the project start-up phase
D. When the project is funded

10. What phase of the project life cycle is concerned with the questions, problems and procedures of getting the project underway?

A. Planning
B. Preparation
C. Organization
D. Operational control

PRE - POST TEST ANSWERS

PRE-TEST	POST TEST
1. B	1. A
2. A	2. B
3. C	3. C
4. B	4. D
5. C	5. A
6. C	6. C
7. D	7. D
8. D	8. C
9. C	9. C
10. A	10. B

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